SmartStream Coordination Meeting Minutes
April 5, 2005

Attendance: Sophia Bedard; Pete Bostian; Ken Dinsmore, Ed Green, Randy Keller, Mel Lambert, Dave Mayo, Cathy McClintock, Jim Racheff

1. Receipt Archived: Receipts through 9/2001 were archived in January. The procedure took much longer than anticipated; consequently we have postponed archiving Purchasing data until we are certain that it can be done over a weekend. We originally wanted it done before we migrate to the new computer system but we may have to wait until we get the new computer.

2. New Computer Hardware: Pete reported that a purchase request for the new computer was submitted in March. He thought that it had been pre-approved but the requisition status is "pending approval". Randy and Ken will look into the status of the request. C&SS had new power circuits installed in the Computer Room to accommodate the new hardware. This computer should be dramatically faster – six processors with lots of memory and hard disk space.

3. Web Reports: Ed Green has been working on converting Access reports to web reports and the end users are responding – the Travel reports were modified several times based on end-user (AP) requests. We found out that AP takes the travel report and re-enters the data into an Access database. They also do this with one or more other reports. No one at the meeting understood why they did this.

    Pete noted that he and Ken Dinsmore have been going through the report activities to try and develop a report framework so that each group of users would have one main report menu. This would reduce the number of activities and would organize the reports into categories – purchase orders, ledger - instead of the current apparently random grouping of reports in report sets. Users will have to go through more than one web menu to obtain the desired report but the will have much more flexibility in obtaining the information they require – especially with the ability to link to related data.

4. Bar Coded Delivery Ticket/Scanner: This project is on hold until funding is obtained for the equipment. While the basic system worked there were several issues unresolved – bulk deliveries without signature; difficulty in entering employee numbers; what to do with the library receiving books. A barcoded employee ID badge was one suggestion for simplifying the employee identification procedure.

5. Workflow Revised with Structures: Sophia reported that the revised workflow procedures based on structures was placed into production – and the best part is that now changes can be done during the day instead of over the weekend. Lab 19 was added last week and no complaints or problems were reported.

6. PCard Modifications: Pete reported he has been working with Purchasing on the specifications for modifying the system to remove the default center and account numbers from the individual card holders. Cardholders are not changing the default numbers when necessary and do not notice it until the orders are reconciled. Once reconciled, the order cannot be changed. Corrections then have to be made by AP through ledger journal vouchers. Pete

wrote up the modification request last year. It was reviewed by Purchasing and Pete sent it to the vendor last week. We received a response from the vendor and are reviewing it now. Also pending are the modifications (if any) required so Purchasing can begin using the PCard system for requisitions entered through SmartStream.

7.   Warehouse Item Descriptions: Pete reported that there are differences in the descriptions of the same warehouse items in SmartStream. The item master may have one description, while the item site permits a different description for each site. Since we have two purchasing sites – FCRF and GRP1, an item can have three different descriptions – none of which may be the same as the item description in the mainframe-based warehouse inventory system. Pete did a comparison of the two sites and there were approx 900 items with different descriptions. He noted that he could find no evidence of any batch updates on the items since the GRP1 site items were created.

Jim Racheff said he remembers that when a change was made in the WIC system, Cindy Farling was to be notified and the SmartStream item would be manually updated. Prior SmartStream minutes indicated Pete was going to make some batch changes to the descriptions but there is no evidence that it was done.

Dave inquired about possible changes for the future of the WIC system.   Jim said it depends on what FME decides to do, whether a new CMS (work order) system will be purchased and whether it will include a warehouse system component.

8.   Requisition Load for Service Contracts: Pete received a request to determine if requisitions produced by the CMS system for service contracts could be directly loaded into SmartStream. Currently, these requisitions are printed from the CMS and are manually entered into SmartStream.   He noted that he thought that this could be done but a new purchase entity would have to be created so that the item comments from the requisition lines could be copied to the purchase order, otherwise there would be little saving of effort. Debbie Hogarty brought the request to Jon Oyhus who forwarded it to Pete. Pete thought that it is something we can do. We will create some batch requisition data manually and test loading it. Mel noted that buyers would have to connected to any new purchase entity and reports may have to be changed to access the data.

9.   Status of NIH Business System re NCI-Frederick: Pete inquired about an article he and Ken had noticed in a recent *Poster* that Dave Ramos commented about using the NIH business system for Property Management and Acquisitions at the NCI-Frederick.   Discussion followed about what that meant and its impact on SmartStream, Receiving, etc. Randy said NIH is not changing our systems here at all – that government people here may start using more of the NIH systems.

10. Library Receiving: Pete noted that the Library is still using the old receiving report for book deliveries. We found this out when we removed the receiving report activity. He would like to switch them to the procedure that the Receiving Department uses to record the receipts and produce the delivery tickets. Dave confirmed that the library records the receipts into SmartStream. C&SS will discuss this with Sue Wilson.

The next meeting will be held May 3, 2005, at 9:00AM in the Building 362 conference room.